Trilogy DESIGN ™

Software for Product Designers, Engineers and Prototypers

Product Description
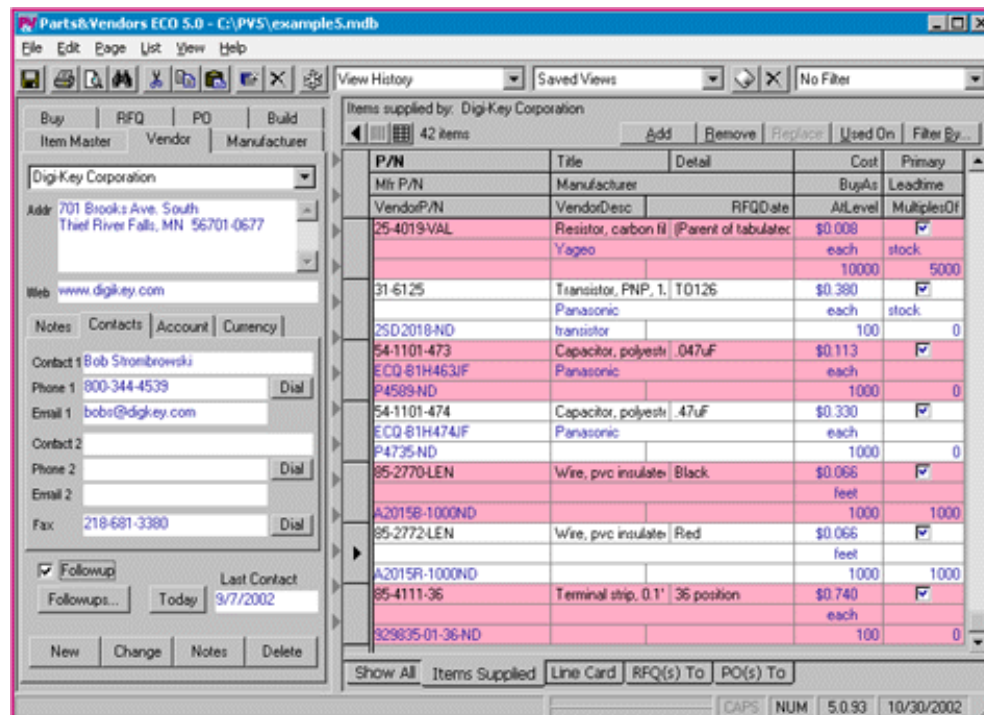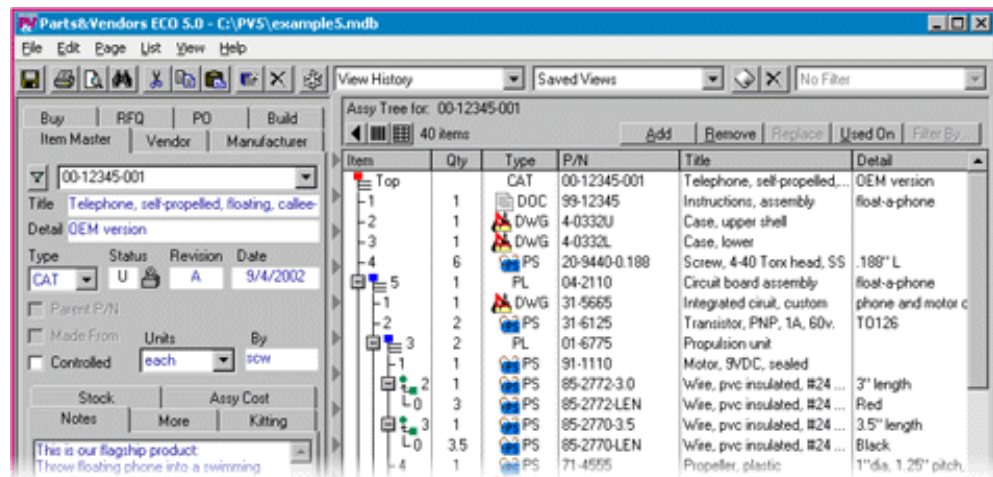
Parts & Vendors ™ VERSION 5.0

Parts&Vendors is a personal parts list manager and vendor database that helps keep track of all the components that go into a new product design. Its features make it easy to keep track of the sources and costs of a new design as the development work progresses. It can be used stand-alone as a simple desktop application, or a single data file can be shared among a group of users. Data on-screen is unbound (isolated from the main data file until saved or refreshed), ensuring smooth workgroup data file sharing.

Once you begin to enter your own P/Ns and item data, you'll find it easy to organize them into top level assemblies and sub-assemblies.

The assembly tree shows organization of subassemblies and Made-From branches within a whole product. Icons visually separate different types of items.

Drag and Drop to easily re-arrange items while the assemblies are still in development.

This screen shows items supplied by this vendor.

Items can have as many sources (vendors/ manufacturers) as needed.

Vendors, Manufacturers and the Line Card links between them can be added on-the-fly.

Each source for an item can have as many price breaks as desired. The program will automatically use the best price break for a specified order quantity.

P&V can be set to automatically increase the order quantity if the next break results in the same or lower cost.

	Cost	Primary
	BuyAs	Choice
RFQ Date	AtLevel	Leadtime
	$18.100	☑
	each	0
4/3/1998	50	

Price Breaks

	Close	
	Cost	At Level
	$27.000	1
	$18.550	25
	$14.250	50
▶	$13.500	100

Program will use best price break for specified order quantity.

Notice the rows of tabs below the grid: List choices are based on context of database Control Pane (Item Master, Vendor, RFQ, etc.).

Set columns to show, column order, sort order, and column widths for screen or reports.

Fonts and colors are user-settable.

☐ Controlled	each ▼	scw	

Notes	More	Kitting
Stock		Assy Cost

0   Minimum   ☐ Copy to Details

☐ When Ordering, Maintain Minimum.
☑ Expand Assy in Tree + Purch/Kit Lists.
☑ Include Assy P/N on Purchase List.

Stock 34   Cur.Cost $4.100

New	Change	Copy	Delete

70-4578	DWG	Gasket	
70-7878	DWG	Hub, retaining	
71-4555	PS	Propeller, plastic	1"dia, 1.25" pitch, .0
85-2770-3.5	PS	Wire, pvc insulated, #24 AWG stra	3.5" length
85-2770-5.25	PS	Wire, pvc insulated, #24 AWG stra	3.5" length
85-2770-LEN	PS	Wire, pvc insulated, #24 AWG 7/3	Black
85-2772-3.0	PS	Wire, pvc insulated, #24 AWG stra	3" length
85-2772-LEN	PS	Wire, pvc insulated, #24 AWG 7/3	Red
85-4111-36	PS	Terminal strip, 0.1" ctrs, rt. angle	36 position
85-4111-6	PS	Terminal strip, 0.1" ctrs, rt. angle	6 pos.
85-8101	DWG	Flex circuit, keypad	
87-0104	DWG	Printed circuit board	float-a-phone
91-1110	PS	Motor, 9VDC, sealed	

Show All	Sources	Parts List	Assy Tree	Made From	Makes	Detail Items
Inventory	On Orders	RFQ(s)	Used On	Not Used	Files/URLs	

F4 opens list; Or- type to auto-find a P/N. Tab or Enter to refresh record.   CAPS NUM 5.0.93 10/30/2002

Each listing has its own label facility, with saved field selections.

Choose from popular Avery® label sizes for laser/inkjet sheets of labels (in Letter and A4 sizes).

Supports Dymo/CoStar® or Seiko® single label printers.

New label definitions can be entered for styles beyond those included with the program. The EX and ECO Editions let users create custom label layouts.

Labels

To print labels for Selected rows only, select grid rows before opening this dialog.

Layout

Caption	Data	
☑	P/N	▼
☐	Title	▼
☐	Detail	▼
☑	Cur.Cost	▼
☑	Stock Bin	▼

Print
Preview
Save/Close
Cancel
Layout

Optional Text [_____]   # of Labels 1

Print To
○ Default (page) Printer   ● Label Printer   [Dymo/CoStar LabelWrit ▼]

Label Choice
Style [Dymo/CoStar 30252 - 1.125" x 3.5" ▼]   Add/Edit
Font **Arial**   [...]   Margins

Filter By

Match	Fields		Include	Exclude	Compare		Data or Field		Field
	Title	▼	⊙	○	Contains	▼	screw		☐
A	Title	▼	○	⊙	Contains	▼	SS		☐
L	Stock	▼	⊙	○	Less Than	▼	MinStock	▼	☑
L	(None)	▼	⊙	○	Contains	▼			☐
	(None)	▼	⊙	○	Contains	▼			☐

Selected Filter

Non SS screws below min stk ▼		Apply	No Filter
Save As...	Delete	OK	Close

Any grid listing can be filtered by multiple user-selection criteria. Compare to fixed entries or compare field values. Filters can be named and saved for reuse.

In workgroup environments, the EX and ECO Editions can be set up with user logins and permission groups. This distributes editing permission to various areas of the program appropriate to a user's job function, allowing lookup access while protecting critical data from inadvertent changes.

When sharing a data file, all copies of the program must be the same version (i.e. 5.0).

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What is the difference between P&V and inventory software?

The Parts&Vendors program is a set of tools for engineers and technical staff concerned with developing specs, parts lists and documenting sources of supply for the components designed into new products. While P&V does perform simple manipulation of inventory, the program does not significantly overlap with the functions of manufacturing or MRP (materials, resources, & planning and variations on that theme) software. Those programs usually have functions for tracking work orders, allocating inventory for a future build, accounting for work-in-process, scheduling/accounting of labor resources and extensive accounting functions.

Parts&Vendors *will* tell you what items are needed, what's available and what's short for a build of your product, and what they will cost. P&V will also adjust order quantities for overkitting, maintaining stock minimums, and take "already on order" into account. It will generate Kit Lists to prepare for your prototype or production run.

What is your upgrade policy?

We are dedicated to refining and improving the Parts&Vendors program, and send notifications of significant upgrades as they become available. We strive to hold the upgrade cost to a minimum. Minor updates (bug fixes and operational improvements) are available free from our web site, so you can always download the most current release of the program. Information to access the User Area of our web site is included with the software.

What is your tech support policy?

Technical support is free. We ask that you pay for the phone call, however, and *not* call the 800 sales line. When trying to determine how to perform certain operations with the software, we request that you consult the manual or On-line Help first, before calling Tech Support.

What if I buy the PV-SE license and then later decide that I should have bought the PV-EXtended edition?

While the major version number (e.g., 5.0) of the program you have is still current, we will credit your purchase of the SE Edition against an upgrade to the EXtended Edition. Similarly, we will upgrade your copy(ies) of the program to the ECO Edition by charging you only the difference in price.

Can I use Parts&Vendors on a network?

Yes, P&V is designed to be used in small workgroups as well as stand-alone. However, the program itself is NOT run from across the network. Instead, the program is installed on each workstation as though it is going to be stand-alone. Create a new data file at one position. Then, move that data file onto the network (onto a server or wherever it will be backed up daily). From each workstation where P&V is installed, go to the menu and choose File...Open... and browse for your "workgroup-common" data file. Click "Open" and you're there.

What is the file format?

The Parts&Vendors data file format is Jet 4.0, compatible with Microsoft Access® 2000/2002. One data file contains your entire resource of all projects, items, lists, and vendors. The single file is easy to maintain and back up, and keeps all relational integrity in one place. For experts wanting to perform "special" operations or create tools to transfer data to/from other systems, the file can also be opened with a retail copy of Access 2000/2002. Parts&Vendors stands alone, and does not require that you have Microsoft Access.

I have lots of data in another database format. Can I transfer it into Parts&Vendors?

If you can get your data into a comma- or tab-delimited text format, then P&V has easy-to-use import tools. Microsoft

Excel® will save worksheets in this format. Since Excel will also open some other database files (dbf, fixed width text, etc.) it can function as a versatile conversion tool. This can be helpful for starting up your P&V database from your existing data, while avoiding a lot of manual data entry.

Will P&V work with my schematic or PCB layout software?

OrCAD®, Protel® and others export their parts list information as a delimited text data file. Depending on how much effort you have put into organizing these programs' internal databases, you may have only marginally useful reporting functions directly from that program. P&V helps you bring in the data that you have, and enhance it as a parts list with linked suppliers, costs, links to CAD files and other supporting information.

What other software will P&V work with?

P&V will also link path and file names of other files to each item in the Item Master. Then, from P&V, you can run the native application(s) for those other files directly from P&V without having to hunt for the file and its location from the other program. P&V also provides a place to specify all the other viewers and/or editors you have, and you can choose which one to run from a pop up list.

When printing RFQs and POs (EX & ECO Editions only), Parts&Vendors can send a whole group (or just one) to the vendor(s) via Winfax®. P&V sends the respective vendor fax number to Winfax® via a Windows DDE connection.

Item Master

Part numbers (up to 50 characters) are alphanumeric and can contain punctuation. Program suggests next available P/N based on user settings and existing data.

Item specifications include two levels of description (255 characters each), Revision, Type, Status, 60K of Notes, 5x100 char. user-captioned fields, By, Date, and default Units of Measure.

Parent P/N's group families of similar items together with common plus unique description fields. Items can have independent sources and/or cost linked to parent number. Families can be copied, retaining original P/N suffixes.

Files Listing keeps track of drawings or other specs or web page for each item. Launch a program based on file name extension, run a specific viewer or editor from a pop up list, or open the system web browser to the specified web URL address.

Used On/Not Used listings identify item usage.

Assemblies

A Parts List (a single assembly) is displayed on a configurable grid that permits showing more items or more info on screen and on printed pages.

Assembly Tree shows entire product's multi-level organization. Expand or Hide to show as much detail as desired. Option to show subassembly branches only to show product structure without the clutter of individual items. Drag and Drop to easily re-arrange items on assemblies. Quantity and Reference fields can be also edited on this view.

Any Assembly can be set to not expand, for when it is acquired as a single component.

Reference Designators - program can count them and optionally set Qty=Count.

Sources

Vendor Database is linked to items to track costs, vendor specs, availability. Includes address, phones, user code, customer account number, terms, contact names, web site, notes, follow-up tickler and autodialer. Can launch e-mail program addressed to any selected text.

Manufacturer Database is linked to Items to track Mfr P/N's. Includes address, phones, user code, contact names, web site, notes, and autodialer. Choose Mfr P/N's from the user-generated list, or make new entries on the fly.

Line card links manufacturers to distributors. Create new links, or entries of either, on-the-fly.

Price Breaks can be entered for each source link (any number of breaks at any quantity).

Units of Measure define the Use-As and Buy-As increments, and can be the Items' defaults, or respecified for each source link. Program uses the user-defined conversion when calculating order quantities.

Buy in Multiples Of feature is handy when there is a minimum purchase increment.

Purchase List

Automatically generated shopping list (extended bom) for a single assembly or for a whole product. Items listed have quantities consolidated based on multiple in the product, plus adjustments for:

- Shortages only or full quantities
- Increase by overkitting quantities
- Increase to maintain minimum stock levels
- Reduce by quantities already on order(s): Pending, Open, Closed, filtered by Job number.

Cost Summary

Tree view shows the costs for all items in a multi-level assembly, with totals for each assembly, separated by item costs and direct vendor costs (which can be used for direct labor). Expand/Hide tree branches to show the level of detail desired.

Kit List

An automatically generated pick list for a single assembly or for a whole product, with items separated by each assembly they are used on, with options to:

- Use available finished subassemblies from stock
- Increase by overkitting quantities

Requests for Quotation

Suggest Next RFQ Number based on user setting and existing data.

Enter prices from vendor replies right on the RFQ to update the main database.

Selectable reply address(es) can differ from administrative (billing) address, when quote is to return to Engineering.

Inventory Adjustments

(This program is NOT "inventory management software," however it does include some basic inventory functions related to its other features).

Reduce stock for a whole group of items when pulling for Kits to go to the production area.

History of (kitting/bulk) inventory adjustments - Who, What, When, Why.

Import

From delimited ASCII text files - comma (csv) or tab separated. (Excel and many other programs can save in this format).

Export

- Export any listing To CSV (comma separated values) file or to an Excel file.
- Export any listing via the clipboard to spreadsheet or word processor.
- Print any report to a .PDF file (viewable with Adobe Acrobat viewer).
- Merge an individual assembly, a whole product, or bulk data into another P&V data file.

Find

In the context of the entire database, or only in the current listing, by any field.

List Builder

Select multiple items, then apply them to a list all at once. Tools to filter or sort the list as desired to narrow the selection of items.

Multiple Currencies

- Costs can be entered and/or displayed in local currency or in a foreign currency. Each vendor can have its own dedicated exchange rate, or use a common exchange rate for the specific currency.
- When the exchange rate is changed, the costs in the foreign currency remain unchanged. Displaying costs in local currency will show the results of the updated exchange rate.

View History

Parts&Vendors saves the last 50 screen views during any active session. Choose a previous view from the dropdown list on the toolbar, or Alt+left arrow / Alt+right arrow to navigate Back and Forward.

Reports and Labels

- Professional looking printed output
- Print labels to sheet styles (Avery and equivalent) or single label printers (Dymo/CoStar and Seiko).

We receive an ongoing stream of emails and faxes about our Parts&Vendors software. Some of the comments below were taken from messages that included users' wish lists for future releases. Some just took the time to tell us that we are making a difference.

"We're getting comfortable with the system and like it.
The importing function is great! I mass load stuff in Excel, copy/paste what I need, and then blap the whole thing into P&V."
N.W., Growth Networks

"You have a great program, and like the microwave [oven], I'm not sure how we got along before, without it."
K.O., Technology Kitchen Corporation

"I want to tell you that you have managed to produce a great program.   ...We are a small but growing company, and P&V will be sufficient for a long period."
P.G., Technomed Europe (Netherlands)

"I just used the 'Compare Parts List' feature for the first time.   Thank you. It just saved my bacon. I had copied one parts list to another with a new name, made the changes to reflect the new design requirements, AND mistakenly thought I had done a thorough and correct conversion. 'Compare Parts Lists' pointed out my error. ...Thanks again for a great product."
R.P., BiT Microsystems, Inc.

(Upon resolution of a tech support problem): "Everything seems to be functional now. Hey, let me convey our appreciation for your support and involvement with this problem. It's refreshing to buy a product from someone and have them help you when you have or cause problems. Seems like such a simple, basic concept as a principle of doing business. Anyway- thank you."
M.H., Los Alamos National Laboratory

"I've been using P&V 3.0 for about 1 month now and I am happy!   This release is a leap ahead of V2."
A.P., National Research Council (Canada)

"Great program... Your concept of simplicity is excellent."
R.B. Surface Preparation Systems

"Have been using your program for over a year and love it."
E.J., Electronic Systems Integration, Inc.

"Y' know, Trilogy is just about the most honest software group I've ever come across. It's been a real pleasure to use your program."
T.B., The Signal Group

"Overall I think P&V is a great program. It's a great start for us... Your telephone support is the best I have attempted...
The best of any application package I have ever used --by far, is another way to say it... Keep up the good work..."
J.L., FLIR Systems

"This is a kick ass product. Within 15 minutes we were working. Congratulations."
W.W., Image Logic Corporation

"...I would go as far as saying it's the best purchase of software I've ever made. The functionality you built into it and the user interface is Great!"
R.R., Lock Systems

"We are delighted with our new P&V software. ...We have used high-end MRP systems in our previous lives, and we have the budget to install such a system here if and when we need to, but the expense and complexity are unnecessary at this point in our evolution. ...We applaud your "keep it simple" approach."
M.D., Ardent Communications Corporation

"It has already exceeded our expectations as to its capabilities and is very easy to use. It suits our purposes (and checkbook) very well..."
M.G., Rocky Mountain Research

"I'm not sure what I would have done without it."
L.L., Lowell Technologies, Inc.

"We love the Parts&Vendors software and have had no trouble installing and learning its features and functions."
A.S., Wright & McGill Co.

System Requirements:

Windows 98/NT/2000/Me/XP
800x600 minimum screen resolution
64 megabytes of memory minimum; more is better.

Parts&Vendors is a relational database. Items in the master tables are "reused" on multiple assemblies as you add the P/N's to your parts lists.

The maximum number of items depends upon the performance of your computer. The actual numeric limit is greater than what will ever be reached in practice.

File format is Microsoft JET® 4.0. Compatible with Microsoft Access® 2000 or 2002.

For accessing the connection to Intuit's QuickBooks® accounting software, you must have the 2002 or 2003 Pro, Premier or Enterprise Edition (USA versions only at this time), running on the same computer, and the EX or ECO Edition of Parts&Vendors.

Generic file utilities built into the program include file compacting, copy (backup), converting item descriptions to mixed case text, and the ability to run an action SQL. Product-specific utilities are numerous and best reviewed from examination of the demo.

NOTE: While Parts&Vendors will make adjustments to stock and keep a history record of bulk adjustments made when Kitting for a 'build' of product, it should not be considered Inventory Tracking Software. Cost histories and inventory cost averaging are not a part of the program.

Technical support is free. Contact Trilogy Design Support at:

support@trilogydesign.com

Phone: 530-273-1985
Fax: 530-477-9106

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